

# **Module 16:**

# **Issuing**

# **Food Instruments**

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## Overview

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## Introduction

This module will help you understand generally how WIC issues food instruments. **This module is not a substitute for AIM training.**

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## Learning Objectives

After completing this module the CNW will be able to:

- show how to print, verify and distribute food instruments;
  - describe the procedure for monthly, bi-monthly and tri-monthly issuance of food instruments;
  - describe how to void a food instrument;
  - describe how to change a food package;
  - describe how to maintain FI Paper security\*; and
  - show how to load FI Paper, change the printer ribbon, and clear paper jams.
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*\*Words that you may not know are **underlined**. Definitions for these words can be found in the **Glossary** at the end of the module. (Note: Words are only underlined the first few times they appear in the text.)*

# How to Issue Food Instruments

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## Definition

### Issuing food instruments:

Food instruments are sometimes called:

- vouchers
  - checks
  - drafts
  - food instruments
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## Supplies for Issuing Food Instruments

You will need the following to issue food instruments:

- Food Instrument Paper
  - an AIM computer terminal and
  - a food Instrument printer.
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## Printing & Distributing Food Instruments

The following charts show you how to:

- print food instruments and
  - distribute (give) food instruments.
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## Learning Activity 1

To learn more about the steps to take to issue food instruments you may want to try **Learning Activity 1** found at the end of this module.

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## Printing Food Instruments

1.	Set up the printer and the AIM computer that you will use.
2.	Go to the <i>Logon to Printer</i> screen in AIM.
**3.	Load the FI Paper in the printer.
4.	Run a test print.
5.	Print the food instruments for the family name you want to print.

\*\*This step is NOT necessary if the FI Paper has already been put into the printer.

# Process For Distributing Food Instruments\*\*\*

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## 1. Check identification of participant.

- Ask for the participant's WIC ID Folder.
  - If the participant has forgotten their folder you may accept another form of photo identification.
  - If the participant has lost their folder, check photo identification and issue another one.
  - If the participant has sent an authorized representative, make sure she/he has the ID Folder and has signed it.
  - If the participant has sent a proxy, make sure she/he has the ID folder and has a permission slip from the participant.
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## 2. Check that the food instrument is correct.

- Make sure that the dates on the food instruments are correct. Dates will be off if the pick up day is not accurate or needs updating.
  - Make sure that the correct food package is being given.
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## 3. Teach participant or authorized representative how to use the food instruments correctly.

- Teach **new** participant's/authorized representatives how to use the food instruments.
  - Make sure **all** participants/authorized representatives know how to use food instruments.
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*\*\*\*Note: Your local agency may issue food instruments differently.*

## Process For Distributing Food Instruments\*\*\* (continued)

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4. **\*\*Mail food instruments** if the participant does not have an authorized representative or proxy who can pick up the food instruments and the participant:

- Is ill, including hospitalization of the participant after delivery,
- Is caring for an ill family member
- Does not have access to transportation  
OR the participant:
- Is unable to travel safely due to severe weather or disaster, or
- Is unable to receive food instruments because AIM is down.

**\*\*Check with the policy of your local agency.**

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**\*\*\*Note:** *Your local agency may issue food instruments differently.*

## Monthly, Bi-monthly and Tri-monthly Issuance of Food Instruments

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### Frequency of Distribution

A participant may get food instruments for 1 ,2 or 3 months depending on her/his category and the local agency's policy.

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### Monthly Issuance

Monthly issuance is printing and giving food instruments so the participant gets 1 food package. This food package gives the participant a **1 month supply** of supplemental foods.

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### Bi-monthly Issuance

Bi-monthly issuance is printing and giving food instruments so that the participant gets a food package for the **current month and one for the next month**.

Participants **cannot** use the food instruments for the next month until the "FIRST DAY TO USE" dates.

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### Tri-monthly Issuance

Tri-monthly issuance is printing and giving the participant food instruments so the participant gets food packages for **3 months**.

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### Learning Activity 2

To learn more about how your local agency issues monthly, bi-monthly and tri-monthly food instruments you may want to try **Learning Activity 2** found at the end of this module.

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# Voiding Food Instruments

Definition	Voiding a food instrument is marking it not usable or “VOID”
2 Types of Voids	There are 2 types of voids: <ul style="list-style-type: none"><li>• void <b>without</b> reissue and</li><li>• void <b>with</b> reissue.</li></ul>
Void without Reissue	You will use “void <b>without</b> reissue” when you want to void a food instrument and <b>do not</b> want to reissue it.
Void with Reissue	You will use “void with reissue” when you want to void a food instrument <b>but want to reissue it</b> .
Voiding Food Instruments	Voiding food instruments includes: <ul style="list-style-type: none"><li>• writing “VOID” on the unusable food instrument and</li><li>• processing the void in AIM by entering the appropriate reason code. See your supervisor for local policy on how codes are used.</li></ul>
Storing Voided Food Instruments	Store voided food instruments away from participants.
Learning Activity 3	To learn more about how food instruments are voided at your local agency you may want to try <b>Learning Activity 3</b> found at the end of this module.



# Changing Issued Food Packages

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## Changing Food Instruments

Sometimes WIC staff need to change food instruments that have already been issued.

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## Examples

Some examples of when a food instrument may need to be changed are:

- A woman gets a solely breastfeeding package and later decides to give formula part of the time.
  - A participant needs a different type of formula.
  - A participant wants to change from regular milk to lactose -reduced milk.
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## How to change Issued Food Packages

To change issued food packages in AIM, you will usually go through 2 steps:

1. change prescription and
2. change issued food packages.

A change in prescription is only needed when there are more months left in the certification period for which the change applies.

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## Learning Activity 4

To learn more about how to change issued food packages you may want to try **Learning Activity 4** found at the end of this module.

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# Maintaining FI Paper Security

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## FI Paper Security

The checks that make up WIC FI Paper, are like blank checks. Your agency is responsible for them and must make sure they do not become lost or stolen.

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## Food Instrument Security

FI Security means the safekeeping of WIC FI Paper.

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## How to Maintain Security

The chart on the next page lists ways to maintain FI Paper security. Each local agency has its own way of maintaining security. Check with your local agency to see how FI Paper is handled.

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## Receiving FI Paper

- Compare the food instrument paper you receive with the list of food instrument paper on the packing slip.
  - If there are any mistakes, contact your supervisor.
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## Storing FI Paper

- Store FI Paper in a secure, locked area.
  - Limit access to authorized staff only.
  - Keep an FI Paper inventory log.
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## Transporting Food Instrument Paper

- Use containers with locks to move food instrument paper from main office to different agency sites.
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## Issuing Food Instruments

- Do not leave FI Paper unattended. Keep it away from participants, children and all other unauthorized persons.
  - At the end of the day or a work session, lock up FI paper.
  - Make sure the person who prints checks for certification is not the same person who issues the checks to the participant.
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## Learning Activity 5

To learn more about how your agency handles FI Paper security you may want to try **Learning Activity 5** found at the end of this module.

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## Loading FI Paper, Changing the Printer Ribbon and Clearing Paper Jams

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**Printer Skills** You will need to know how to use the printer that is used to print food instruments. You will need to know how to:

- load FI paper,
- change the printer ribbon, and
- clear paper jams.

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**Job Aids** Refer to your printer's Job Aids for detailed descriptions on how to work with your printer.

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**Learning Activity 6** To learn more about how to use the printer at your local agency you may want to try **Learning Activity 6** found at the end of this module.

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## Summary

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### Issuing Food Instruments

Issuing food instruments is:

- printing food instruments and
  - giving them to the participant
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### Monthly, Bi-Monthly and Tri-Monthly Issuance of Food Instruments

Food instruments may be issued monthly, bi-monthly or tri-monthly, depending on the policy of your agency.

Monthly is issuing food instruments for 1 month; Bi-monthly is issuing food instruments for 2 months; and Tri-monthly is issuing food instruments for 3 months.

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### Voiding Food Instruments

Voiding food instruments involves making food instruments not usable and marking them as “VOID”. There are 2 types of voids:

- Void without reissue.
  - Void with reissue.
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### FI Security

Check with your local agency to see how FI Paper is handled. Some suggestions follow:

- store FI Paper in a secure, locked area,
  - limit access to authorized staff only,
  - keep a FI Paper inventory log.
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## Glossary

FI Paper security – FI Paper security is the safekeeping of WIC FI Paper so that it does not become lost or stolen.

Bi-monthly issuance – Bi-monthly issuance is printing and giving food instruments so that the participant gets a food package for the current month and one for the next month.

food instrument – A food instrument is a special check given at WIC that is used to buy WIC authorized foods at authorized WIC grocery stores.

food package – A food package is a combination of WIC allowed foods that are given to a participant based on the participant's category, age, and nutritional need.

issuing food instruments – Single issuance is printing and giving food instruments so the participant gets one food package for the current month.

Tri-monthly issuance – Tri-monthly issuance is printing and giving food instruments so the participant gets food packages for 3 months.

void – A food instrument that is void is NOT usable, marked "VOID", and also voided in AIM.

## Progress Check

1. Mark with a check (✓) the supplies that you will need to issue food instruments.

\_\_\_\_\_ **cash register**

\_\_\_\_\_ **copy machine**

\_\_\_\_\_ participant

\_\_\_\_\_ box of FI Paper

\_\_\_\_\_ computer printer

\_\_\_\_\_ AIM computer terminal

\_\_\_\_\_ fax machine

2. Number the steps a WIC staff person would go through to print a food instrument when **FI Paper is already in the printer**. Order them from 1 to 3.

\_\_\_\_\_ go to the *logon to printer* screen in AIM

\_\_\_\_\_ run a test print if you are the first one to print checks that day

\_\_\_\_\_ print food instrument for the family name you want

3. List three reasons a WIC staff person might mail food instruments to a participant:

## Progress Check (continued)

4. Fill in the blanks with the correct numbers.

A participant who is **issued one month** food instruments receives:

\_\_\_\_\_ packet(s) of food instrument for him/herself and returns in  
\_\_\_\_\_ month(s) for her/his next WIC appointment.

A participant who receives **tri-monthly issuance** of food instruments receives:

\_\_\_\_\_ packet(s) of food instruments for him/herself and returns in  
\_\_\_\_\_ month(s) for her/his next WIC appointment

5. For each of the types of void situations listed below, mark "Y", yes for void **and reissue** and "N" for void and **no reissue**.

\_\_\_\_\_ Food instrument was stolen  
\_\_\_\_\_ Food instrument issued in error  
\_\_\_\_\_ Food package was incorrect and needed to be changed  
\_\_\_\_\_ Pick up day needed to be changed so that the checks may be used today  
\_\_\_\_\_ Food instrument was damaged

6. Mark with a check (✓) when a WIC staff person would change a food package.

\_\_\_\_\_ A participant wants to change her baby's formula from Regular Enfamil to Lactofree Enfamil.

\_\_\_\_\_ A breastfeeding participant wants to give her infant formula part of the time rather than just breastfeeding

\_\_\_\_\_ A participant wants bread added to the food package

\_\_\_\_\_ A participant wants yogurt instead of milk

## Progress Check (continued)

7. Mark the following as “TRUE” or “FALSE”.

\_\_\_\_\_ It is best to transport food instrument paper in a locked container

\_\_\_\_\_ It is not a problem if some of the voided food instruments do not appear on the *daily voided food instruments report*

\_\_\_\_\_ Do not leave FI Paper unattended

\_\_\_\_\_ Store FI Paper in a secure, locked area`

\_\_\_\_\_ It is important to keep an FI Paper inventory log

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## Learning Activities

The following activities are included and are recommended for interactive learning:

- Learning Activity 1: Issuing Food Instruments
- Learning Activity 2: Monthly, Bi-monthly and Tri-monthly Issuance
- Learning Activity 3: Voiding Food Instruments
- Learning Activity 4: Changing Issued Food Instruments
- Learning Activity 5: FI Paper Security
- Learning Activity 6: Using the Printer

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## Learning Activities (continued)

### Activity 1: Issuing Food Instruments

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#### Learning Objectives

After completing this activity the CNW will be able to:

- Show how to print, verify accuracy of, and distribute food instruments.

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#### Instructions

1. Arrange to observe a co-worker issue food instruments to a participant.
  2. Use the check list on the next page to write down your observations.
  3. Talk to your supervisor to discuss your observations.
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## Learning Activities (continued)

### Activity 1: Issuing Food Instruments (Continued)

Item (Note: these may vary depending on your agency)	✓
Was the printer & computer set up?	
Was the FI Paper, already in the printer?	
Was a test check printed?	
Did the participant or authorized representative show identification?	
Was the food instrument checked for correctness?	
Did staff show the client where to sign/ Food Instrument Signature Line?	
Did staff explain how to use the food instruments?	
Comments:	

## Learning Activities (continued)

### Activity 2: Monthly, Bi-monthly and Tri-monthly

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#### Learning Objectives

After completing this activity the CNW will be able to:

- Describe how to issue monthly, bi-monthly and tri-monthly food instruments.

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#### Instructions

1. Ask your supervisor for the written policies your agency has on monthly, bi-monthly and tri-monthly food instruments.
  2. Read over these procedures.
  3. Talk with your supervisor about the procedures.
  4. Make sure you understand these procedures.
  5. Explain the procedure for monthly, bi-monthly and tri-monthly issuance to your supervisor.
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## Learning Activities (continued)

### Activity 3: Voiding Food Instruments

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#### Learning Objectives

After completing this activity the CNW will be able to:

- void a food instrument.
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#### Background

Voiding a food instrument is making it not usable or “VOID”.

There are 2 types of voids:

- void without reissue and
  - void with reissue.
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#### Instructions

1. Ask a co-worker to show you how she/he voids a food instrument.
  2. Write down your notes on the next pages.
  3. Make sure s/he explains how to void a food instrument with re-issuance and without re-issuance.
  4. Discuss your observations with your supervisor to make sure you understand how to correctly void food instruments.
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## Learning Activities (continued)

### Activity 3: Voiding Food Instruments (Continued)

VOID WITH REISSUE		
<i>Step</i>	<i>AIM Screen that Appears</i>	<i>What to do</i>

## Learning Activities (continued)

### Activity 3: Voiding Food Instruments (Continued)

VOID <u>WITHOUT</u> REISSUE		
Step	AIM Screen that Appears	What to do

## Learning Activities (continued)

### Activity 4: Changing Issued Food Packages

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#### Learning Objectives

After completing this activity the CNW will be able to:

- Describe how to change an issued food package

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#### Instructions

1. Ask a co-worker to show you how s/he changes an issued food package.
2. Write down your notes on the next page.
3. Discuss any questions you may have with your supervisor.

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## Learning Activities (continued)

### Activity 4: Changing Issued Food Packages (Continued)

VOID <u>WITHOUT</u> REISSUE		
<i>Step</i>	<i>AIM Screen that Appears</i>	<i>What to do</i>

## Learning Activities (continued)

### Activity 5: Food Instrument Paper Security

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#### Learning Objectives

After completing this activity the CNW will be able to:

- Describe how to maintain food instrument paper security

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#### Instructions

1. Ask your supervisor to show you how your local agency maintains food instrument paper security.
2. Write down your notes on the next page.
3. Discuss any questions you may have with your supervisor.

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## Learning Activities (continued)

### Activity 5: Food Instrument Security (Continued)

*Notes:*

**Receiving Food Instrument Paper:**

**Storing Food Instrument Paper:**

**Transporting Food Instrument Paper:**

**Additional Notes:**

## Learning Activities (continued)

### Activity 6: Using the Printer

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#### Learning Objectives

After completing this activity the CNW will be able to:

- Load food instrument check paper,
- Change the printer ribbon, and
- Clear paper jams.

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#### Instructions

1. Ask your supervisor for a copy of information on how to use the printer.
  2. Review the sections that explain how to load paper, change the printer ribbon, and clear paper jams.
  3. Ask your supervisor to show you how to load paper, change the printer ribbon, and clear paper jams.
  4. Now ask your supervisor to watch you load paper, change the printer ribbon, and clear paper jams. Do this several times until you feel comfortable using the printer.
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## Progress Check Answers

1. Mark with a check (✓) the supplies that you will need to issue food instruments.

_____ cash register	_____ copy machine
✓_____ participant	✓_____ FI paper
✓_____ computer printer	✓_____ AIM computer terminal
_____ fax machine	✓_____ WIC food issuance signature log

2. Number the steps a WIC staff person would go through to print a food instrument when **food instrument paper is already in the printer**. Order them from 1 to 3.

\_\_\_\_\_ **1** go to the *logon to printer* screen in AIM

\_\_\_\_\_ **2** run a test print if you are the first one to print checks that day

\_\_\_\_\_ **3** print food instrument for the family name you want

3. List three reasons a WIC staff person might mail food instruments to a participant:

**Answers might include any 3 of the following:**

- ***Participant is ill/hospitalized and cannot come to clinic & does not have an second authorized representative:***
- ***Participant or second authorized representative do not have access to transportation;***
- ***AIM is down; or***
- ***Bad weather makes it hard for the participant to travel***

4. Fill in the blanks with the correct numbers.

A participant who is **issued one month** of food instruments receives

  1   packet(s) of food instrument for him/herself and returns in

  1   month(s) for her/his next WIC appointment.

A participant who is **issued tri-monthly** food instruments receives

  3   packet(s) of food instruments for him/herself and returns in

  3   month(s) for her/his next WIC appointment

5. For each of the types of void situations listed below, mark "Y", Yes, for void and **reissue** and "N " for void and **no** reissue.

  N   food instrument was stolen

  N   food instrument issued in error

  Y   food package was incorrect and needed to be changed

  Y   pick up day needed to be changed so that the checks may be used today

  Y   food instrument was damaged

6. Mark with a check (✓) when a WIC staff person would change a food package.

       a participant wants peanut butter instead of beans

  ✓   a breastfeeding participant wants to give her infant formula part of the time

       a participant wants bread added to the food package

       a participant wants yogurt instead of milk

## Progress Check Answers (continued)

7. Mark the following as “TRUE” or “FALSE”.

**TRUE** It is best to transport food instrument paper in a locked container

**FALSE** It is not a problem if some of the voided food instruments do not appear on the *daily voided food instruments report*

**TRUE** Do not leave food instrument paper unattended

**TRUE** Store food instrument paper in a secure, locked area`

**TRUE** It is important to keep a food instrument paper inventory log

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